

LISTING OF CLAIMS

The following "Listing of Claims" replaces all prior versions and Listings of Claims in the application:

1. (Currently Amended) A computer-implemented method for creating a portfolio of issues comprising the steps of:

receiving computer input identifying specific ~~specifying~~ issues to be added to the portfolio;

receiving computer input indicating a selection of ~~selecting~~ one of a plurality of options for creating the portfolio;

receiving computer input indicating a past date for purchase of the portfolio; and
creating the portfolio and calculating the portfolio's past performance, using a computer,
based on said selection of one of said plurality of options and the past date.

61 2. (Currently Amended) The computer-implemented method according to claim 1, wherein said receiving computer input indicating the selection ~~selecting step~~ includes receiving computer input indicating a selection of ~~selecting~~ an option to allocate a number of shares for each issue.

3. (Original) The computer-implemented method according to claim 2, wherein the number of shares is constant for each issue.

4. (Original) The computer-implemented method according to claim 2, wherein the number of shares is not constant for each issue.

5. (Original) The computer-implemented method according to claim 2, wherein the number of shares for each issue is based on a weighting factor.

6. (Currently Amended) The computer-implemented method according to claim 1, wherein said receiving computer input indicating the selection ~~selecting step~~ includes receiving

computer input indicating a selection of selecting an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is selectable by a user.

7. (Currently Amended) The computer-implemented method according to claim 1, wherein said receiving computer input indicating the selection selecting step includes receiving computer input indicating a selection of selecting an option to allocate a total amount for the portfolio.

8. (Original) The computer-implemented method according to claim 7, wherein said amount is equally divided between said issues.

9. (Original) The computer-implemented method according to claim 7, wherein said amount is not equally divided between said issues.

61 10. (Original) The computer-implemented method according to claim 7, wherein said amount is divided between said issues based on a weighting factor.

11. (Currently Amended) The computer-implemented method according to claim 1, ~~further comprising the step of selecting~~ wherein a historical date for the purchase price for each specific issue in of the portfolio is obtained, by the computer, from a historical database, based on the past date.

12-16. (Canceled).

17. (Currently Amended) A computer-readable medium having a computer-executable program stored thereon for creating a portfolio of issues, said program comprising the steps of:
receiving identification of specific specifying issues to be added to the portfolio;
receiving a selection of selecting one of a plurality of options for creating the portfolio;
receiving input indicating a past date for purchase of the portfolio; and
creating the portfolio and calculating the portfolio's past performance based on said selection of one of said plurality of options and the past date.

18. (Currently Amended) The computer-readable medium having said program according to claim 17, wherein said receiving the selection ~~selecting step~~ includes receiving a selection of ~~selecting~~ an option to allocate a number of shares for each issue.

19. (Original) The computer-readable medium having said program according to claim 18, wherein the number of shares is constant for each issue.

20. (Original) The computer-readable medium having said program according to claim 18, wherein the number of shares is not constant for each issue.

21. (Original) The computer-readable medium having said program according to claim 18, wherein the number of shares for each issue is based on a weighting factor.

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22. (Currently Amended) The computer-readable medium having said program according to claim 17, wherein said receiving the selection ~~selecting step~~ includes receiving a selection of ~~selecting~~ an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is selectable by a user.

23. (Currently Amended) The computer-readable medium having said program according to claim 17, wherein said receiving the selection ~~selecting step~~ includes receiving a selection of ~~selecting~~ an option to allocate a total amount for the portfolio.

24. (Previously Amended) The computer-readable medium having said program according to claim 23, wherein said amount is equally divided between said issues.

25. (Previously Amended) The computer-readable medium having said program according to claim 23, wherein said amount is not equally divided between said issues.

26. (Previously Amended) The computer-readable medium having said program according to claim 23, wherein said amount is divided between said issues based on a weighting factor.

27. (Currently Amended) The computer-readable medium having said program according to claim 17, ~~further comprising the step of selecting wherein a historical date for the purchase price for each specific issue in of the portfolio is obtained from a historical database, based on the past date.~~

28. (Currently Amended) A system for creating a portfolio of issues comprising:
~~an input system a user input~~ for receiving a designation of issues, ~~and~~ for receiving a designation of an option ~~for of~~ creating said portfolio selected from a plurality of options, ~~and ;~~
~~an input~~ for receiving a historical price associated with each of said issues; and
a processor for determining the number of shares of said issues to add to said portfolio and past performance data relating to the portfolio based on said designated option and said historical price.

29. (Canceled).

30. (Currently Amended) A computer-readable medium having a computer-executable program stored thereon for creating a portfolio of issues, said program comprising the steps of:
receiving identification of specific specifying issues to be added to the portfolio;
receiving identification of specifying a past closing date for the issues;
receiving historical prices for the specific specified issues based on the past specified closing date;
receiving a selection of selecting a quantity of said specific specified issues; and
creating the portfolio based on the specific specified issues, ~~and~~ the selected quantity of the specific specified issues, and the historical prices; ~~and~~
~~storing said portfolio.~~

31. (Previously Amended) The computer-readable medium according to claim 30, wherein said storing step stores said portfolio on a client computer.

32. (Previously Amended) The computer-readable medium according to claim 30, wherein said storing step stores said portfolio on a server computer.

33. (Currently Amended) The computer-readable medium according to claim 30, said program further comprising the step of:

receiving other information regarding the specific ~~specified~~ issues.

34. (Currently Amended) A computer-implemented method for creating a portfolio of issues comprising the steps of:

receiving computer input identifying specific ~~specifying~~ issues to be added to the portfolio;

receiving computer input identifying a past ~~specifying~~ a closing date for the issues;

receiving computer input including historical prices for the specific ~~specified~~ issues based on the past ~~specified~~ closing date;

receiving computer input indicating a selection of ~~selecting~~ a quantity of said specific ~~specified~~ issues; and

creating the portfolio, using a computer, based on the specific ~~specified~~ issues, and the selected quantity of the specific ~~specified~~ issues, and the historical prices; and ~~storing said portfolio.~~

35. (Previously Amended) The computer-implemented method according to claim 34, wherein said storing step stores said portfolio on a client computer.

36. (Previously Amended) The computer-implemented method according to claim 34, wherein said storing step stores said portfolio on a server computer.

37. (Currently Amended) The computer-implemented method according to claim 34, further comprising the step of:

receiving other information regarding the specific ~~specified~~ issues.

38. (New) A computer-implemented method for creating a portfolio of issues comprising the steps of:

receiving computer input identifying specific issues to be added to the portfolio;

receiving computer input indicating a selection of one of a plurality of options for creating the portfolio; and

creating the portfolio, using the computer, based on said specific issues and said selection of one of said plurality of options.

39. (New) The computer-implemented method according to claim 38, wherein said receiving computer input indicating the selection includes receiving computer input indicating a selection of an option to allocate a number of shares for each issue.

40. (New) The computer-implemented method according to claim 38, wherein said receiving computer input indicating the selection includes receiving computer input indicating a selection of an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is selectable by a user.

41. (New) The computer-implemented method according to claim 38, wherein said receiving computer input indicating the selection includes receiving computer input indicating a selection of an option to allocate a total amount for the portfolio.

42. (New) The computer-implemented method according to claim 38, further comprising automatically retrieving current issue price information relating to the specific issues, using the computer, wherein said creating the portfolio further is based on said retrieved current issue price information.

43. (New) A computer-readable medium having a computer-executable program stored thereon for creating a portfolio of issues, said program comprising the steps of:

receiving identification of specific issues to be added to the portfolio;

receiving a selection of one of a plurality of options for creating the portfolio; and

creating the portfolio based on said specific issues and said selection of one of said plurality of options.

44. (New) The computer-readable medium having said program according to claim 43, wherein said receiving the selection includes receiving a selection of an option to allocate a number of shares for each issue.

45. (New) The computer-readable medium having said program according to claim 43, wherein said receiving the selection includes receiving a selection of an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is selectable by a user.

46. (New) The computer-readable medium having said program according to claim 43, wherein said receiving the selection includes receiving a selection of an option to allocate a total amount for the portfolio.

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47. (New) The computer-readable medium having said program according to claim 43, wherein said program further includes the step of retrieving current issue price information relating to the specific issues, wherein said creating the portfolio further is based on said retrieved current issue price information.

48. (New) A system for creating a portfolio of issues comprising:
an input system for receiving a designation of issues and for receiving a designation of an option for creating said portfolio selected from a plurality of options; and
a processor for automatically retrieving a price associated with each of said issues and for determining the number of shares of said issues to add to said portfolio based on said designated option and said price.
